PRISM Budget Data Download/Upload (from Excel spreadsheet to PRISM)

A utility is available in PRISM to update the business line / performance measures data in the PBS module by means of an upload from an Excel spreadsheet. Take note of the following:

a) You can upload only one specific business line at a time.

b) You can upload a specific eroc, or if an MSC user you can upload all erocs within your MSC.

c) You can upload a specific appropriation or all appropriations.

d) The number and order of columns in the spreadsheet you upload must exactly match the columns in the spreadsheet produced by the download-to-Excel utility.

e) The upload will **completely overwrite** the existing data you have in PRISM for the business line, eroc(s), and appropriation(s) being uploaded.

f) If any edit-check or other errors are encountered during the upload process then nothing will be loaded and the existing PRISM data will be left unchanged.

f) Before overwriting the existing PRISM data the upload process will first copy the existing data to level '9' in PRISM for the business line, eroc(s), and appropriation(s) being uploaded. This will provide a back-up in case something goes wrong and we need to put the original data back in place.

Instructions

There are four basic steps: (1) Create an Excel spreadsheet with the data you want to upload, (2) Save the spreadsheet to a comma-delimited (csv) file, (3) Use FTP to move the csv file to the wpc21 computer, and (4) log into PRISM and run the upload utility.

(1) Create Excel spreadsheet

First you need to create a spreadsheet in Excel with the data you want to upload. There are several ways to get started.   You can create the spreadsheet from scratch, making sure the columns match the columns defined for the FY 2008 budget submission. Or you can download an FY 2007 spreadsheet from PRISM and modify it so that the columns match the FY 2008 required columns. Or, you can download an FY 2008 spreadsheet from PRISM and simply update it as needed for the FY 2008 submission. The following are specific instructions for downloading an FY 2008 spreadsheet from PRISM. There are three steps: (a) Log on PRISM and run the extract, (b) Use ftp to download the data file(s) to your PC, and (c) Import the data file(s) into Excel.

(a) Log on PRISM and run the extract

Log on to PRISM and from the main menu select item #2 (PBS Module) and then on the next menu select #24 (Business Line Download).

You can then indicate the parameters for the data you want to extract: Budget Fiscal Year (2008), PRISM Level (C), EROC, Approp (choose a specific appropriation or enter '%' for all appropriations), and Business Line (choose a specific business line or

enter 'ALL' for all business lines). You will also be asked whether you want the data sorted by District, MSC, or HQ rank.

After you complete this screen the extract is initiated and you can exit out of PRISM if you wish.

(b) Use FTP to download the data file(s) to your PC

The Corps network now requires a secure version of ftp software in order to transfer files. There are various versions of secure ftp available, so instructions depend on the ftp you are using. A secure ftp is available to all Corps users from the CEEIS secure login ("MindTerm") web site. This is the site that most PRISM users access to gain secure access to the PRISM screens. The following instructions are based on the use of ftp from the CEEIS secure login ("MindTerm") site:

On your PC, start Internet Explorer and connect to https://seclogin.usace.army.mil/

Click on wpc21 (lower left of screen) and enter your CEEIS userid and Unix password when prompted.

From the menu bar to the top of the screen click "Plugins".

Select "SFTP File Transfer".

The left side of the screen will show the directories on your pc.

On the right side of the screen, double click on "reports".

Then locate and highlight (click once on) the file named bp**xxx**_dat.**n** (where **xxx** is the business line (fdr, nav, hyd, etc.) and **n** is a number which distinguishes multiple versions of the file). The highest value of **n** is the most recently generated file. You can highlight several files at the same time by holding down the [Ctrl] key while clicking on the files. If you requested ALL business lines, in addition to files for each business line a file named bpall_dat.**n** will also be available which contains the data fields common to all business lines.

On the left side of the screen, change to whatever directory into which you want to store the downloaded file(s). Then click on the arrow in the center of the screen that points to the left. This will download the file(s) you highlighted.

(c) Import the data file into Excel

Once you have the bpxxx_dat.n file(s) downloaded to your pc, then start up Excel and "open" the bpxxx_dat.n file. The Excel Text Import Wizard should automatically come up.

On the first screen select "Delimited" and then click Next.

On the second screen select "Semicolon" as the Delimiter. Also make sure that Text Qualifier is a double quote, and then click Next.

On the third screen click Finish, and the spreadsheet will open up.

You can then change data values, and delete or insert rows in the spreadsheets. Leave the number and order of columns exactly the same as produced by the download. The first row should contain column headings. Note that the right-most column indicates the last column of data and should contain the value 'X' on each data row. This marker column (as well as all other columns) must remain in place. Re-formatting the columns, such as using wrap-text or changing the font, is allowed.

Several business lines ask for textual remarks. The **maximum number of characters** allowed for each of these textual data fields are:

NAV: Project Description – 250 characters
     Consequences - 160 characters
     Purpose - 160 characters
     Remarks - 600 characters
     Dam Safety Impacts – 160 characters
     Relative Risk – 160 characters

FDR: Project Description – 250 characters
     Consequences - 160 characters
     Purpose - 160 characters
     Remarks - 600 characters
     PERCAP Reamrks - 250 characters
     Risk - Egress - 250 characters
     Risk - Remarks - 500 characters
     Dam Safety Impacts – 160 characters
     Relative Risk – 160 characters

HYD: Project Description – 250 characters
     Remarks – 600 characters
     Justification/Funding Argument - 480 characters
     Budget Item Description - 80 characters

ENR: Project Description - 625 characters
     Narrative Justification - 500 characters
     Scarcity Documentation - 200 characters
     Connectivity Documentation - 200 characters
     Special Status Species Documentation - 200 characters
     Plan Recognition Documentation - 200 characters
     Output of Increment - 200 characters

CAP: Description - 500 characters
     Output - 200 characters
     Remarks - 600 characters
     Scarcity Justification - 200 characters

Connectivity Justification - 200 characters
Special Status Species Justification - 200 characters
Plan Recognition Justification - 200 characters
Self Sustaining Justification - 200 characters

WTR: Budget Item Description - 80 characters
Remarks – 480 characters

Others: Budget Item Description - 80 characters

For the above data fields if you enter more characters on the spreadsheet than the maximum allowed amount, the field will be truncated to the maximum size when it's loaded into PRISM. If a row of data contains a grand total of more than 4000 characters an error message will be generated and the upload will not be successful. **Do not use double-quote, line-feed, or tab in any of these textual fields or the data will not be able to load properly into PRISM.**

Note: The upload will not work with the bpall_dat spreadsheet which contains common data elements for all business lines; it will only work with the specific business line spreadsheets.

(2) Save the spreadsheet in Comma Delimited (csv) format

In Excel, select File/Save As. Choose "**CSV (Comma Delimited) (*.csv)**" from the Save-As-Type drop down list. For file name, you must use the following naming convention: **aa_b_ccc**
    where   **aa** = the eroc in lower case
                    (use % for the 2nd character for all eroc's in an MSC)
            b = the appropriation code in lower case, up to two characters, % for all
            ccc = the business line code in lower case:
                    CAP = Continuing Authorities Program,
                    ENF = FUSRAP,
                    ENR = Env Restoration,
                    ENS = Env Stewardship,
                    FDR = Flood & Coastal Storm,
                    HYD = Hydropower,
                    NAV = Navigation,
                    REC = Recreation,
                    WTR = Water Supply

Examples:
k7_a_nav.csv is the file name for Wilmington (k7) district's Navigation (nav) data for the General Investigations (a) appropriation.
m%_%_hyd.csv is the file name for Southwestern Division's Hydropower (hyd) data for all (%) appropriations.

(3) FTP the .csv file to wpc21

After creating the .csv file, you must then use FTP to copy the file from your pc to your "reports" directory on the wpc21 computer. Use the FTP instructions provided in section (1)(b) above, except this time you're sending the .csv file you created to the wpc21 computer.

(4) Run the Load procedure in PRISM

Log into PRISM and from the main menu select item #2 (PBS Module) and then on the next menu select #25 (Business Line Upload).

You must then indicate the parameters for the data you want to upload: Budget Fiscal Year (2008), PRISM Level (C), EROC (enter a specific eroc or % in the second character for all eroc's in an MSC), APPN (choose a specific appropriation code or % for all), and Business Line (choose a specific busines line code). The EROC, APPN, and Business Line entries must match the corresponding items in the file name of the .csv file you want to load.

After you complete these entries, the system will check to see if it can find a .csv file in your Reports directory whose filename corresponds to the EROC, APPN, and Business Line parameters you entered on the screen. If it finds the .csv file, you will be asked to press the [ENTER] key, and then the [END] key.   Then you will be prompted whether and where you want the log file to be printed. After this, the upload process is initiated.

The upload should be complete in less than a minute. The system will create a log file named **bpuploadstat** in your Reports directory showing the results of the upload. You may want to view this file, or else just go into the Business Line maintenance screen and query some data to verify that the upload ran successfully and that your data was changed as you expected. Note that if any edit-check or other errors are encountered during the upload process then nothing will be loaded and the existing PRISM data will be left unchanged.

Common errors which will make the upload unsuccessful and which will be identified in the bpuploadstat log file include:
a) You've added or deleted columns so that your uploaded file does not match the required columns for the Fy 2008 submission.
b) Certain key fields (such as eroc, appropriation, ccs, pwi/cwis, business line, increment, phase) are missing or invalid.
c) A single row of data (a single line in the .csv file) containing a grand total of more than 4000 characters.
d) Entry of alpha characters in a numeric field, unless the "Edit Criteria (Valid Values)" column in the spreadsheet accompanying these instructions states otherwise for a particular field.

e) Entry of an invalid value in fields for which valid values are defined. (See the "Edit Criteria (Valid Values)" column in the spreadsheet accompanying these instructions.)

f) Entry of double-quote, line-feed, or tab in any of the textual/remarks fields.